

U. S. SECURITIES AND EXCHANGE COMMISSION

Investigation # A-04060

DECLARATION OF JOSEPH MORGAN

Pursuant to 28 U.S.C. Section 1746, the undersigned states as follows:

1. My name is Joseph Morgan I am over twenty-one years of age and have personal knowledge of the matters set forth herein.
2. I am assigned as an IT Specialist to the U.S. Securities and Exchange Commission's Division of Enforcement in Washington, D.C. As part of my duties I have been trained to preserve various forms of online content. For investigation # A-04060 I have been tasked to conduct a Website Capture/Video Capture/Social Media/Telegram/Live Stream/Blog.
3. In support of investigation number # A-04060, and at the direction of my supervisor, I was tasked to conduct an internet preservation of the following URL.

<https://driveplanning.com/>

4. I completed the above mentioned internet preservation on, February 12, 2024, using the following tools:

Adobe Acrobat Pro / Google Chrome Browser / WebPreserver

The above listed tools are commonly used to preserve internet content.

5. I saved the above-mentioned internet preservation using FTK Imager, which ensures that the internet preservation will not be altered or modified during storage. Specifically, FTK Imager forensically seals the internet preservation such that it can be opened only with FTK Imager. The sealed internet preservation has been labeled # A-04060 and saved to the following location:

K:\Other_Projects\Webcaptures\imagefiles

6. I also saved a copy of the above mentioned internet preservation along with this declaration to a network share. The location for this network share is provided below:

\\ad.sec.gov\ENFDataExchange\HQtoARO_dropoffWebcapture

I declare under penalty of perjury that the foregoing is true, correct, and made in good faith.



[Analyst Name]

Executed on this 12th day of February 2024.

EXHIBIT 1



About ▾ How We Help ▾ Events Videos Financial GPS Book a Call



CEO/FOUNDER

TODD BURKHALTER

Atlanta • St. Petersburg

REAL Loan Application CORE Fund Application



Todd Burkhalter's Bio

The past 25 years of my career has been spent consulting with business owners regarding how their business finances intersect with their personal finances; Drive Planning is designed to serve our clients in a fresh and even better way. Drive Planning is a culmination of my years of education in business. Within just a few hours our process provides a new confidence to our Members regarding their personal financial state, as well as a definitive plan for the future. A new lens for creating Contractual Wealth provides a predictable and understandable prescription for future success.



URL

<https://driveplanning.com/todd-burkhalter/>

Timestamp

Mon Feb 12 2024 14:37:15 GMT-0500 (Eastern Standard Time)



Contact Info

📞 (404) 429-4132

✉️ todd.burkhalter@driveplanning.com

LinkedIn [Linkedin.com/in/toddburkhalter/](https://www.linkedin.com/in/toddburkhalter/)

even better way. Drive Planning is a culmination of my years of education in business. Within just a few hours our process provides a new confidence to our Members regarding their personal financial state, as well as a definitive plan for the future. A new lens for creating Contractual Wealth provides a predictable and understandable prescription for future success.

 [LinkedIn.com/in/toddburkhalter/](https://www.linkedin.com/in/toddburkhalter/)



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Work History

- **Chief Executive Officer – Drive Planning**
2014 – Present
- **Contributing Author – Financial Planning Magazine**
2012 – Present
- **Catalyst Wealth Management – Managing Partner**
1997 – 2013



Interests

- Family
- Traveling
- College Football
- Golfing



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Indianapolis, IN

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St. Petersburg, FL

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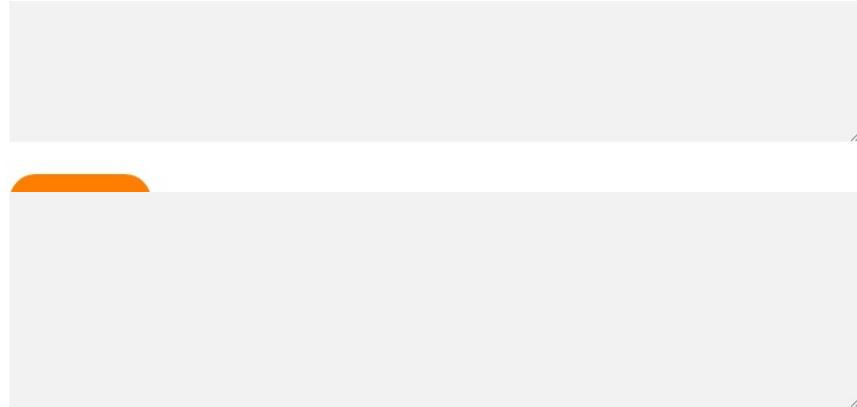
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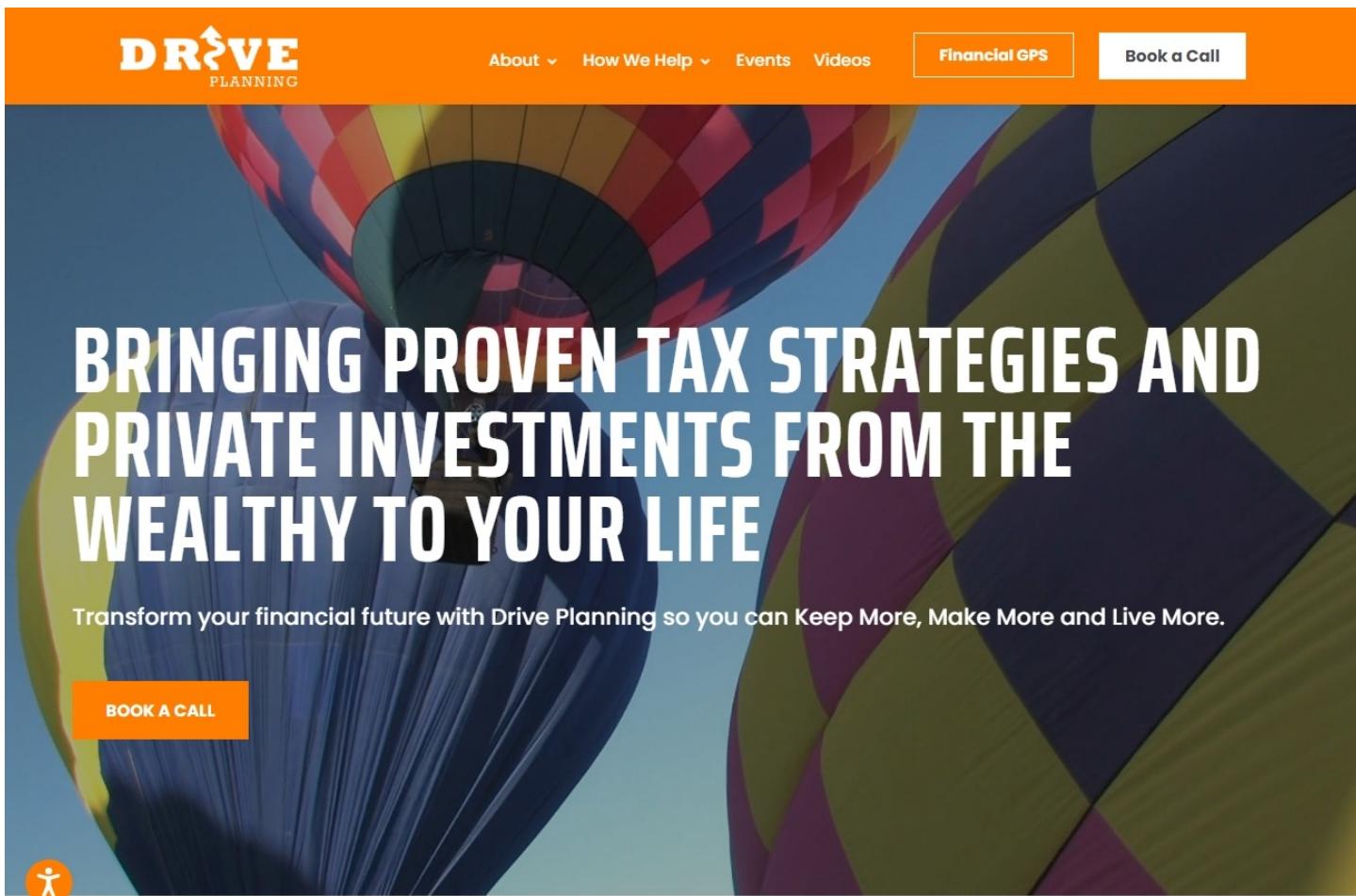
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EXHIBIT 2



DRIVE
PLANNING

About ▾ How We Help ▾ Events Videos Financial GPS Book a Call

BRINGING PROVEN TAX STRATEGIES AND PRIVATE INVESTMENTS FROM THE WEALTHY TO YOUR LIFE

Transform your financial future with Drive Planning so you can Keep More, Make More and Live More.

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ABOUT US

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At Drive Planning we are a comprehensive financial group



ABOUT US —

OUR PHILOSOPHY

At Drive Planning we are a comprehensive financial group. We understand that investments and financial planning can feel overwhelming, that's why we want to guide you in your journey to a successful financial future.

Our personalized approach to financial planning tailors our strategies to your unique needs. We will walk alongside you and together we will craft a plan that suits your goals and gets you excited about your future.

BOOK A CALL



Keep More



Our wealth building strategies will keep



Make More

Using the financial strategies the

Live More

Our financial planning will ensure that you

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Keep More



Our wealth building strategies will keep your money growing and safe from inflation, taxation, litigation, market fluctuation and devastation.



Make More

Using the financial strategies the extremely wealthy have used for decades, we will create a plan for you to make more with your money.



Live More

Our financial planning will ensure that you can have a wealthy retirement and make you confident that your money will not outlive you.

— FEATURED OPPORTUNITIES —

EXPLORE OUR PRIVATE INVESTMENTS

Get more control over your financial life by choosing an investment that aligns with your goals. Our private investments bring you the opportunity to invest in short, mid or long-term investments.

THE REAL ESTATE ACCELERATION LOAN

Insured loans which are backed by real estate collateral

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THE CORE FUND

Cash Out Real Estate Fund through Tax Liens

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RENEWABLE ENERGY FUND

Low-risk, first position debts secured by a PPA.

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— EARLY ACCESS

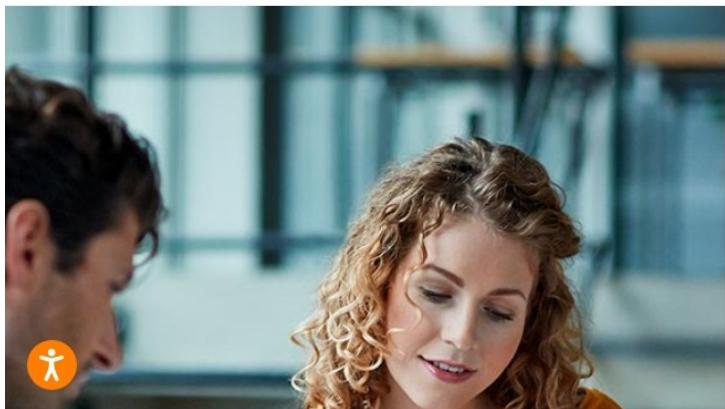
REGISTER FOR OUR NEWSLETTER!

Sign up to learn more about our latest news and get exclusive early access to new investment opportunities.

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Email

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— OUR SERVICES

INVESTMENT APPROACH

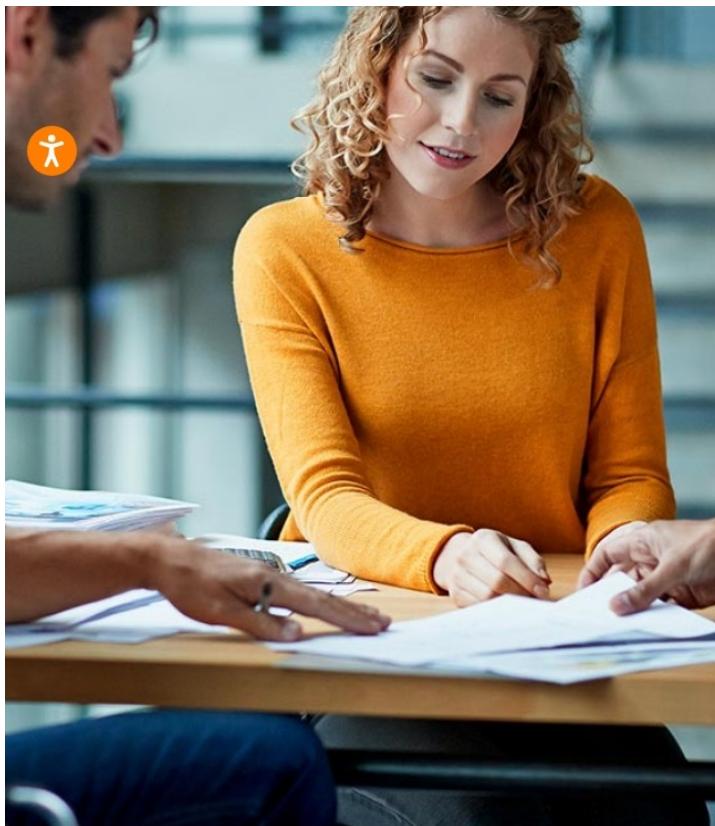
At Drive Planning we help direct our members to a variety of investment types. One common goal is to create an investment portfolio which offers greater control over your return, taxation and potentially guarantees. We assist our members in moving

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At Drive Planning we help direct our members to a variety of investment types. One common goal is to create an investment portfolio which offers greater control over your return, taxation and potentially guarantees. We assist our members in moving away from Statement Wealth and into more Contractual Wealth arrangements. Our investment portfolio consists of traditional stocks and bonds but goes well beyond Wall Street with offerings such as energy projects, real estate, storage units, film and television, CBD Oil and other business opportunities.

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2,527

Happy Clients

15+

Investment Opportunities

OUR SERVICES

TAX SERVICES

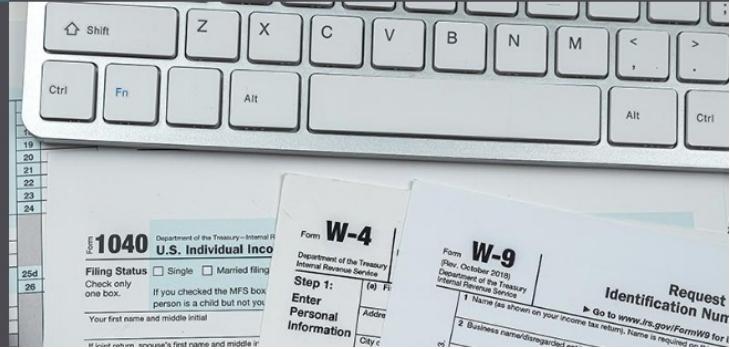
Many accountants focus on solely reporting the results and offering very little strategic advice. We believe that significant tax savings comes through planning which

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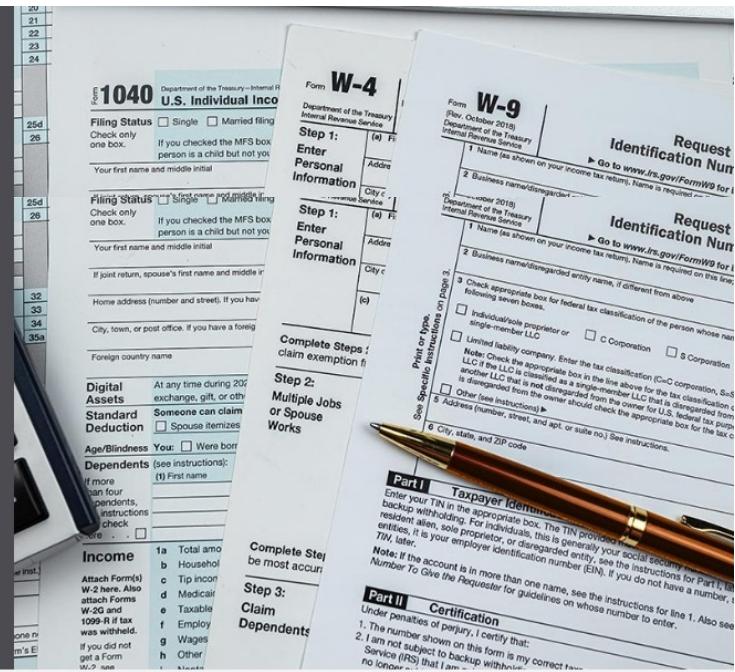
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TAX SERVICES

Many accountants focus on solely reporting the results and offering very little strategic advice. We believe that significant tax savings comes through planning which utilizes the entire tax code. This type of planning is often reserved for the super wealthy, not any longer. Drive Planning is bringing strategic tax saving moves to your financial plan.

[BOOK A CALL](#)


Form 1040 Department of the Treasury—Internal Revenue Service
U.S. Individual Income Tax Return
Filing Status Single Married filing joint
Check only one box. If you checked the MFS box, person is a child but not you.
Your first name and middle initial
Filing Status Single Married filing joint
Check only one box. If you checked the MFS box, person is a child but not you.
Your first name and middle initial
If joint return, spouse's first name and middle initial
Home address (number and street). If you have
City, town, or post office. If you have a foreign
Foreign country name
Digital Assets At any time during 2018, exchange, gift, or otherwise disposed of
Standard Deduction Someone can claim deduction Spouse itemizes
Age/Blindness You: Were born
Dependents (see instructions):
If more than four dependents, check
here
Income
Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see
1a Total amo
b Household
c Tip inc
d Medicaid
e Taxable
f Employ
g Wages
h Other
Complete Step 1: Enter Personal Information
Step 1: Enter Personal Information
Step 1: Enter Personal Information
Step 2: Multiple Jobs or Spouse Works
Step 3: Claim Dependents
Part I Taxpayer Identification
Enter your TIN in the appropriate box. The TIN provided is for backup withholding. For individuals, this is generally your social security number. If you do not have a number, enter alien, sole proprietor, or disregarded entity, see the instructions for Part I, later.
Note: If the account is in more than one name, see the instructions for line 1. Also see Note: If the number shown on this form is my correct TIN, it is my employer identification number (EIN). If you do not have a number, enter alien, sole proprietor, or disregarded entity, see the instructions for Part I, later.
Part II Certification
Under penalties of perjury, I certify that:
1. The number shown on this form is my correct TIN.
2. I am not subject to backup withholding.
3. Other (see instructions):
4. Address (number, street, and apt. or suite no.) See instructions.
5. City, state, and ZIP code
See Special Instructions on Page 3.

STAY IN THE KNOW

WHAT'S NEW WITH DRIVE PLANNING



 RACE CAR TEAM



DRIVE PLANNING FISHERS, IN

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RACE CAR TEAM

Drive Planning is sponsoring Indy Car #67 with driver Elliot Cox for the Sarah Fisher Hartman Racing Team.

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DRIVE PLANNING FISHERS, IN

Come Winter 2023 Drive Planning will be opening a new office in Fishers, IN! Serving Fishers, Indianapolis and surrounding areas, our brand new state of the art office will become a hub for financial literacy and events.

[LEARN MORE](#)

OUR PROCESS —

HOW WE WORK

1. FINANCIAL GPS

We start by gathering your data so that we can better understand your financial life.

2. FINANCIAL MODEL

We input your data into a financial model and uncover red flags and opportunities.

3. WORKING TOGETHER

Armed with knowledge of your financial life, we start working together to ensure that you make the right



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tags and opportunities.

3. WORKING TOGETHER



Armed with knowledge of your financial life, we start working together to ensure that you make the right financial moves to guarantee a better future.

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— CAREERS

START A CAREER AT DRIVE PLANNING

We are continuously looking for great people to join our Drive Planning Team. We have a number of career options and training to support seasoned veterans all the way to career changers. Take a few minutes to learn more about our firm and how you may be a fit.

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EXHIBIT 3



DRIVE
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— HOW WE HELP

THE REAL ESTATE ACCELERATION LOAN

Insured loans which are backed by real estate collateral

This opportunity allows you to participate in real estate development with established companies. This opportunity is secured with real property as collateral.

Try our [investment calculator](#) to see how your investment would grow over time.



[DOWNLOAD BROCHURE](#)

 **COMPANY**

Privately Held

 **MINIMUM INVESTMENT**

\$20,000

 **RATE OF RETURN***

10% ROR

 **HOLDING PERIOD**

3 Months

*Collateralized with Real Estate Security Deed and Cash

URL

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Try our [investment calculator](#) to see how your investment would grow over time.



[DOWNLOAD BROCHURE](#)

MINIMUM INVESTMENT

\$20,000

RATE OF RETURN*

10% ROR

HOLDING PERIOD

3 Months

*Collateralized with Real Estate Security Deed and Cash

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Insured loans which are backed by real estate collateral

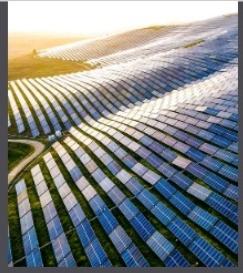
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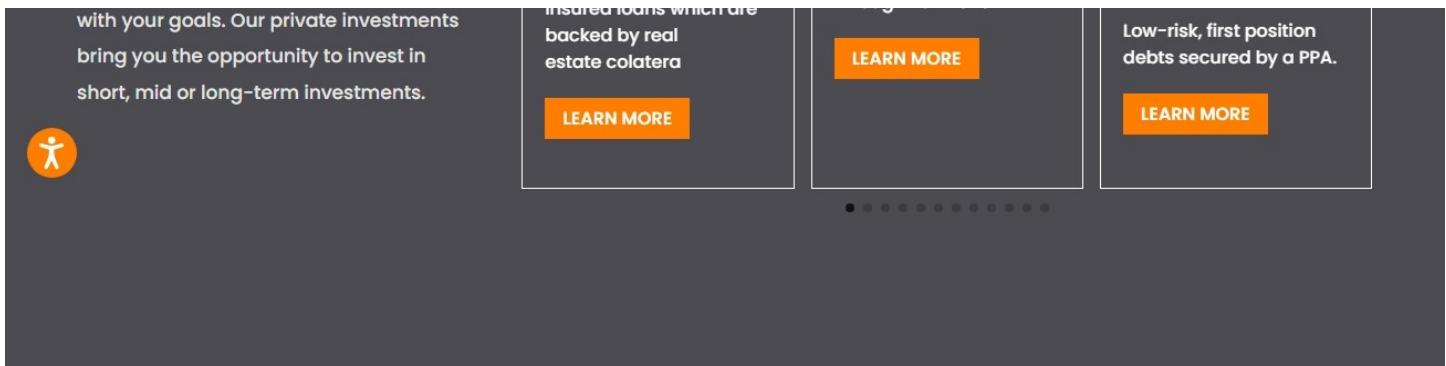


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